



***BluWave* crm**
Recurring Activities and Route Planning
Training Manual

Setting up BluWave CRM for Cyclical Planning

To setup recurring activities, follow the below steps below:

- Step 1- Define routes and add areas to routes
- Step 2- Assign clients to specific areas, routes and type
- Step 3- Add Cycles To Clients
- Step 4- View Cyclical Activity on Company Screen – Cycle Panel
- Step 5- View on Diary Planner and To-do List
- Step 6- View on Cycle Planner
- Step 7- View Cycles
- Step 8- Complete Scheduled Cyclical Activity
- Step 9- Editing a Cycle

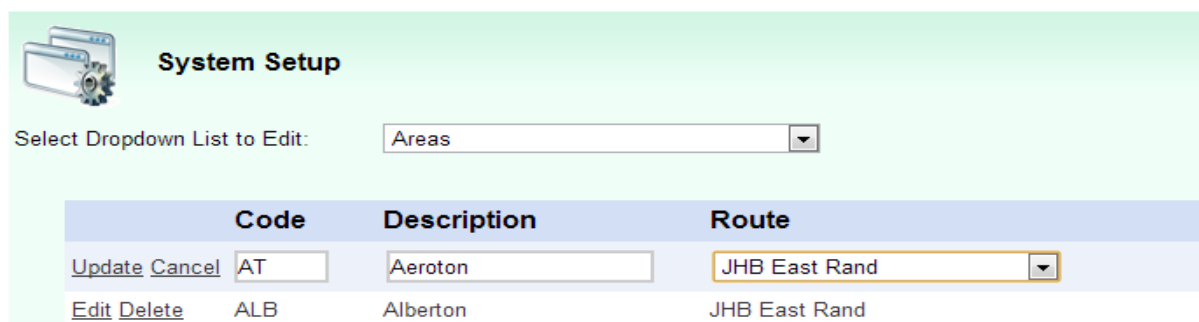
Step 1: Define Routes and Add Areas to Routes

Create routes and add areas to these routes. E.g. All areas in Randburg, Bryanston, Sandton etc can form part of the JHB North Route. The system uses these routes to allow you to plan and see cycles for all customers falling in the same geographical region.

Should you not want to create routes, you assign all your areas to one route.

NB: You cannot assign a recurring activity to a client who has not been assigned to an “Area” and the area must be in turn assigned to a “Route”.

To assign your areas to routes, click on System setup and select “Areas” as shown below. Edit the Areas listed and assign them to the respective route then update.



The screenshot shows the 'System Setup' interface. At the top left is a gear icon. Below it, the text 'System Setup' is displayed. Underneath, there is a label 'Select Dropdown List to Edit:' followed by a dropdown menu currently showing 'Areas'. Below this is a table with three columns: 'Code', 'Description', and 'Route'. The first row has 'AT' in the Code column, 'Aeroton' in the Description column, and 'JHB East Rand' in the Route column. The second row has 'ALB' in the Code column, 'Alberton' in the Description column, and 'JHB East Rand' in the Route column. There are 'Update' and 'Cancel' links next to the first row, and 'Edit' and 'Delete' links next to the second row.

Code	Description	Route
AT	Aeroton	JHB East Rand
ALB	Alberton	JHB East Rand

To add in new routes, use the system setup again and from the drop down list select “Routes”

System Setup

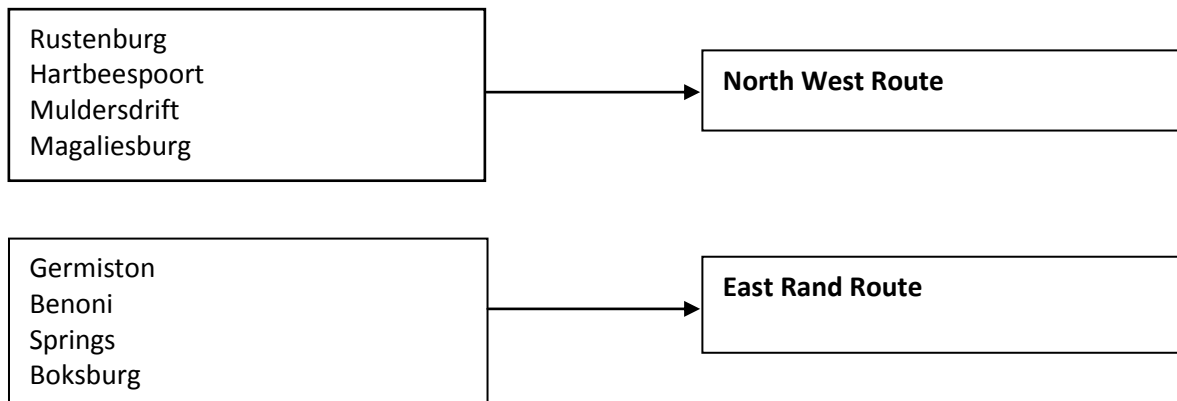
Select Dropdown List to Edit:

Code	Description
Edit Delete 1	JHB Northern Suburbs
Edit Delete 10	PTA North
Edit Delete 2	JHB East Rand
Edit Delete 3	JHB South & Central
Edit Delete 4	JHB West Rand, Krugersdorp
Edit Delete 5	Other Countries
Edit Delete 7	PTA Far East
Edit Delete 8	PTA Centurion
12	

Add a new Route

Route Code: Route Description:

Examples of Routes:



Step2: Assign Areas and Types to Your Customers

Your customers should all be assigned to an “Area” – at least all the customers you wish to assign a recurring activity. In addition, you should also assign a “Type” E.g. type A, B or C to each customer on the “Edit Companies” screen. This will enable you view cyclical activities for specific types of clients in a given area.

Edit Company [Update] [Cancel] [Print Card]

Company Detail

Company Name	Samuel Testing Co	Account Number	123456
Sales Staff	Samuel Kimathi	Date Opened	15/10/2012
Category	Customer	Website	
Type	A Type	Company Size	
State	Active	Sales Staff/	
Source	Banners	Six Month	
Industry	ACCESS CONTROL	Current	
Area	PTA Western Suburbs	Support Suspended?	
Currency to Quote	Rands	Future Requirements	
Payment Terms	30 Day	Price Factor	1 Price List

Step 3: Add Cyclical Activity to Client

Go to Client that you want to create recurring activity for and use the **New link on the Cycles panel** to add the recurring activity.

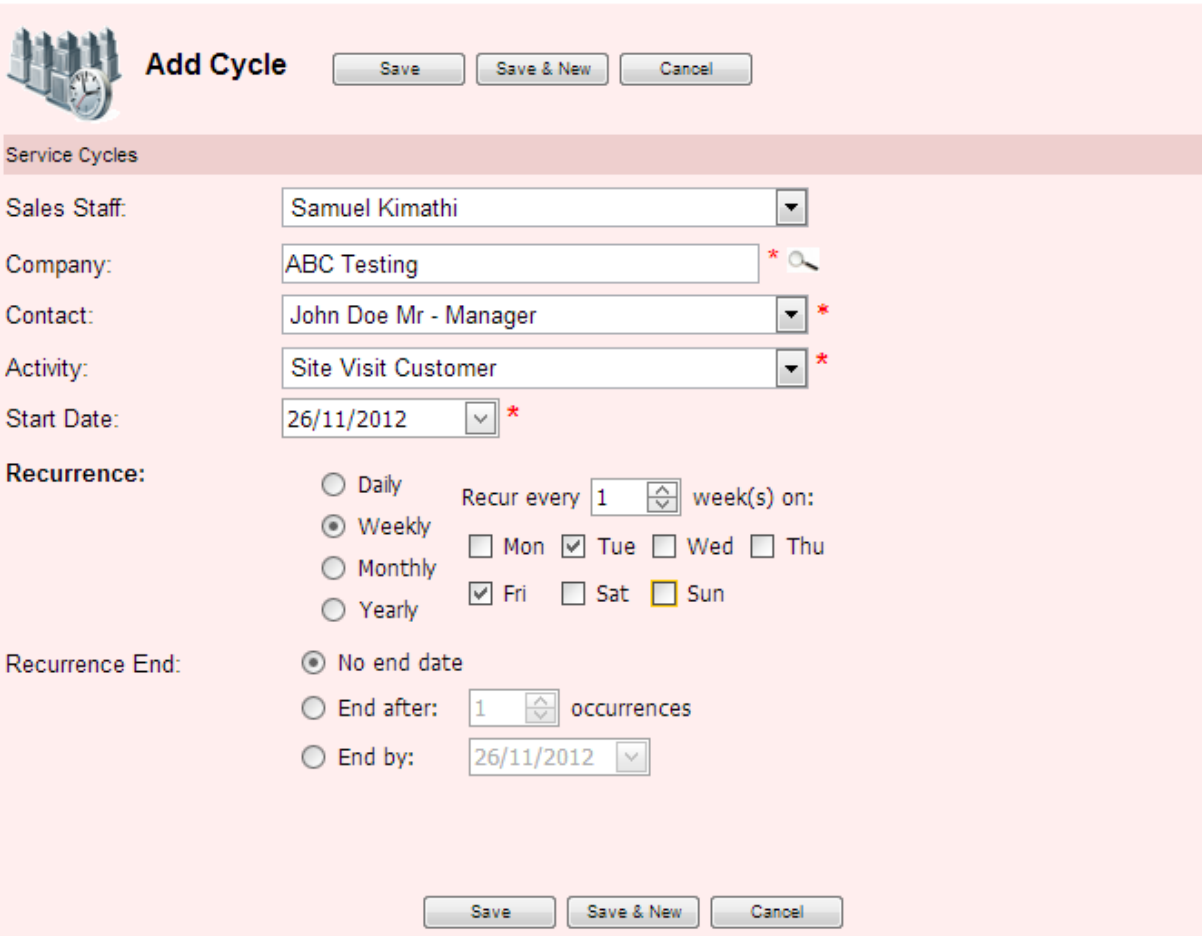
Edit Company [Update] [Cancel] [Print Card]

Company Detail

Company Name	ABC Testing	Account Number	
Sales Staff	Samuel Kimathi	Date Opened	17/10/2012
Category	Customer	Website	
Type	A Type	Company Size	0
State	Active	Sales Staff/Users	0
Source	Cold Call	Six Month Expiry	
Industry	ADVERTISING	Current Version	
Area	Benoni	Support Suspended?	
Currency to Quote	Rands	Future Requirements	
Payment Terms	Rent 60 months	Price Factor	1 Price List

[Contacts](#) [New](#)
[Cycles](#) [New](#)
[Scheduled Activities](#) [New](#)
[Completed Activities](#) [New](#)
[Opportunities](#) [New Quote](#) [New](#)

This will open the below form that allows you to select the recurring activity and set the recurrence as well as the end date if any.



Add Cycle [Save] [Save & New] [Cancel]

Service Cycles

Sales Staff: Samuel Kimathi

Company: ABC Testing *

Contact: John Doe Mr - Manager *

Activity: Site Visit Customer *

Start Date: 26/11/2012 *

Recurrence:

- Daily
- Weekly
- Monthly
- Yearly

 Recur every 1 week(s) on:

- Mon
- Tue
- Wed
- Thu
- Fri
- Sat
- Sun

Recurrence End:

- No end date
- End after: 1 occurrences
- End by: 26/11/2012

[Save] [Save & New] [Cancel]

Step 4: View Cyclical Activity on Company Screen – Cycle Panel

Expand the Cycle panel on the company page to view the next cyclical activity booked for your client.

Contacts ▼ New							
Cycles ▲ New							
	Edit	Overdue	Next Date	Activity	Sales Rep	Contact	Note
Delete			27/11/2012	Site Visit Customer	Samuel Kimathi	Mr John Doe	Site Visit Customer
Scheduled Activities ▼ New							
Completed Activities ▼ New							
Opportunities New Quote ▼ New							

Step 5: View Diary Planner and To-do list

The diary planner and to do list will also show a scheduled recurring activities for clients

Show diary planner for:

<	Today	>	26 – 30 November 2012		Day	Work Week	Week	Month	Timeline
			26 Monday	27 Tuesday	28 Wednesday	29 Thursday	30 Friday		
				ABC Testing - John Doe Mr - Manager - Site Visit Customer		BBB Mines - Mr Mike Reeves - Customer Servicing	ABC Testing - John Doe Mr - Manager - Site Visit Customer		

From the To do list, use the Cycles Radio button to view recurring activities.

The To do list will only show cyclical activities when they are due and when they become overdue.

To Do List Activities Cycles

Show Cycles for From Up to and including

	Edit	Overdue	Next Date	Company	Contact	Activity	Type	Route	Area
Delete		01/11/2012	01/12/2012	Sam test 2	Mr William Delpoit	2nd Adv Consultation			
Delete		01/11/2012	06/12/2012	123Trio1	Denzil Govender	Arrange Cust Visit	Active Prospect	East Rand Route	Aeroton

Step 6: View on Cycle Planner

Navigate to the Cycle Planner under the Activity menu to view all clients with cyclical activities by route for each sale person. Scroll through your plan week by week to see if all the calls are aligned by route and adjust if necessary so as to minimise the sales person’s travel time across his territory.

The feature has some in-built flexibility that designed to assist the sales person when he plans his calls for next week, allowing him the flexibility to move calls around (do this from the Diary Planner). If the sales person is required to make appointments with customers, the system speeds up that process as the activities are already in the system he simply needs to enter the arranged time and the system will send the related appointment invite to the customer and then also book in the sales person’s calendar.

Branch : Bryanston Sales Staff : Samuel Kimathi

30 November – 06 December 2012

	30 November 2012 - 03 December 2012				03 December 2012	
	30 Fri	1 Sat	2 Sun	3 Mon	4 Tue	5 Wed
East Rand Route: Aeroton						
East Rand Route: Benoni	ABC Testing (Site Visit Customer)				ABC Testing (Site Visit Customer)	

Cycle Planner displays recurring activity sorted by Route & Area

Step 7: View Cycles

Use the view cycles panel to search for clients that have recurring activities created for them by route, area and type.

This will show you which clients have been allocated to an area and route and have cyclical activities set for them.

Click on companies then "View Cycles" to get here.

View Cycles

Branch : Bryanston Sales Staff : Tania Cooke-Tonnesen Customer

Route : * Area : * Type : *

Client : *

Company Name	Route	Area	Type	Cycle?
Edit 3D International	JHB Northern Suburbs	Bryanston	Inactive Customer	<input checked="" type="checkbox"/>
Edit 3M Pharmaceuticals		Fourways		<input checked="" type="checkbox"/>
Edit ABB LOW VOLTAGE PRODUCTS	JHB Northern Suburbs	Centurion	Active Customer	<input checked="" type="checkbox"/>
Edit AFGEN (PTY) LTD	JHB Northern Suburbs	Kyalami	Active Customer	<input checked="" type="checkbox"/>
Edit BluWave Software	JHB City Centre	Kya Sands	Active Customer	<input checked="" type="checkbox"/>
Edit DBC COMMUNICATIONS	JHB Northern Suburbs	Lanseria	Inactive Customer	<input checked="" type="checkbox"/>
Edit J-Pak	East Rand Route	Germiston	Active Customer	<input type="checkbox"/>


Sort once here to display clients with cycles

Step 8: Complete Scheduled Cyclical Activity

Click on the date set for the recurring activity and this will open up the activity as normal for completion. You can also complete cyclical activities from the **Diary Planer** and **To-do list**.

Contacts							New
Cycles							New
	Edit	Overdue	Next Date	Activity	Sales Rep	Contact	Note
Delete			27/11/2012	Site Visit Customer	Samuel Kimathi	Mr John Doe	Site Visit Customer
Scheduled Activities							New
Completed Activities							New
Opportunities							New Quote New

Add a note to the activity and complete as usual. This will be shelved on the completed activity panel.



Edit Appointments

Appointment Details * = Required Fields

Sales Staff:

Company: *

Contact: * Invite Contact?

011 824 2208 082 552 5321 j@macs.co.za

Location: [View Map](#)

Activity: *

Task?

Start Date:

End Date:

Activity is Scheduled in the Past, Defaulting to Completed


Quote No Document

Quote Status

Note:

Completed?

Step 9: Editing a Cycle

At any time, you can edit the recurrence of recurring activities by clicking on the  icon – this icon identifies that the activity is of a recurring nature.